CMTS (Case Management & Tracking System) Quick Tour Videos: Searching

Speaker: Welcome to the CMTS demo.

Today, we'll showcase how our advanced search capabilities make finding and managing cases efficient and intuitive.

The quick search box, conveniently located in the upper right corner of every page, allows you to swiftly locate cases by simply entering keywords.

This feature ensures that even the most urgent searches are handled quickly.

Streamlining your workflow.

To access more in-depth search options, select the basic search feature from the navigation menu. On this page, you can filter searches by case state, such as open, closed, pending, or closed, and choose to include or exclude sensitive cases.

You can also choose to include all text documents stored in the system, ensuring no detail is overlooked.

Access the advanced search options section to refine your search further. You can add custom criteria such as specific case attributes or date ranges.

Add as many criteria as needed to hone in on exact matches and avoid sifting through irrelevant data.

The option to use Boolean operators provides even greater control, allowing you to combine multiple criteria for a more precise search.

Results are displayed with hyperlinks, providing instant access to case details.

You can also apply actions to selected cases, such as reassigning cases or adding tasks. Additionally, you can export a CSV of the results or save your search filters for future use, streamlining future searches and case management tasks.

For more information or to schedule a personalized demo, please reach out at 855-636-5361 or team_cmts@securecasemanagement.com.

We're excited to show you how CMTS can elevate your case management with our powerful search features.